

TS-EAS EAC-CPF Berlin meeting

Attendees (in person)

Monday, 9 March 2020

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Attendees (in person)

Name	Institution	Role
Caitlin Rizzo	Penn State University, US	EAC-CPF team
Cory Nimer	Brigham Young University, US	Documentation team
Gerhard Müller	Staatsbibliothek zu Berlin, DE	TS-EAS ex officio
Joost van Koutrik	Het Utrechts Archief, NL	TS-EAS
Karin Bredenberg	Kommunalförbundet Sydarkivera, SE	TS-EAS co-chair
Kerstin Arnold	Archives Portal Europe Foundation, EU	EAD team lead

Regine Heberlein	Princeton University, US	former EAC-CPF team member
Silke Jagodzinski	Geheimes Staatsarchiv Preußischer Kulturbesitz, DE	EAC-CPF team lead

Monday, 9 March 2020

Welcome and introduction

Welcome by Herrn Kriese (Deputy Director, Geheimes Staatsarchiv, Preußischer Kulturbesitz)

Introduction to the meeting by Silke

Organisational matters

- Notetakers:
 - Monday - Regine
 - Tuesday - Cory, Joost
 - Wednesday - Silke/Karin, Regine, Cory
 - Thursday - Joost
- Live note taking during the meeting -> aim to have final notes by end of March 2020
- Report for website / Standards Committee - Kerstin
- Introduction of participants in the room
- Wrap-up session each day -> Zoom meeting options for all TS-EAS members to join sent by Karin in advance
- Sessions with online presenters:
 - Assertion description - Mark
 - RiC - Florence
 - Schema design - Mark
 - Documentation - Ailie

Objectives of the meeting (decide on)

- Agree and finalise some long time discussed questions:
 - Identifiers
 - Single elements and attributes
 - EAD3 reconciliation
 - Namespaces (XML / Xlink)
 - Documentation

Scope of the EAC-CPF Revision

- Bug fixing, even currently are no bugs reported
- User request, see [GitHub issues](#)
- EAD3 Reconciliation
- Two-tier strategy: released schema version 2010 revised end of 2018
 - Minor changes - existing EAC-CPF files are still valid
 - See [homepage](#) for details
 - Schema, RNG, Tag Library released
- Next phase for major revision with 6 main topics: names, dates, identifiers, relations, assertion description and EAD3 reconciliation

- Names, dates - already discussed and finalised during the Austin meeting, cf. [20190801 EAC-CPF minutes.pdf](#)
- Identifiers, EAD3 reconciliation, relations, assertion description - to be discussed and hopefully finalised in Berlin

Timeline

- Planned to finish discussion and decisions latest in Chicago, August 2020
 - Full day meeting in Chicago planned
- Work on Schema and Documentation after Chicago, August 2020
- Release for call for comments in autumn 2020
- Release new version early 2021
- Continue with monthly virtual meeting, 90 minutes
 - Follow in GitHub: [notes](#) and [issues](#)
 - Work with GitHub: one issue for each element/attribute to facilitate schema and documentation work and to provide a summary for all decisions

Status of EAC-CPF revision

Namespaces

- Agreed to remove Xlink namespace
- Open question to remove XML namespace
 - Discussion expected on [Tuesday](#)

Control: align with EAD3 as much as useful and possible

- Discussion expected on [Tuesday](#) and [Wednesday](#)
- Question of spelling names (camel case, lower case...) - to be decided
- Agreed to add optional attributes, aligned with EAD3:
 - @audience: to all elements
 - @encodinganalog: all or only with crosswalks?
 - @relatedencoding: all
 - @countryencoding: // control
 - @dateencoding: // control
 - @langencoding: // control
 - @repositoryencoding: // control
 - @scriptencoding: // control
 - @countrycode: //mainetenanceAgency
 - @instanceurl: //recordId
- Agreed to not to use @localType in // control
- In favour to add language attribute to all (non-empty) EAC-CPF elements
 - Also @script
 - Also @transliteration
 - Pending: decide according elements
- //eventType: element content becomes attribute value
 - Add new mandatory attribute @value with restricted values: cancelled, created, deleted, derived, revised, unknown, updated

- //agentType: element content becomes attribute value
 - Add new mandatory attribute @value with restricted values (human, machine, unknown)

CPF Description

- Agreed to add optional attributes to //list
 - @listtype
 - @mark
 - @numeration

Plural/singular elements: handle in a distinct way

There are formal and informal descriptive elements within //description. Formal descriptive elements can be bundled within their plural element and they can also be repeated as singular elements, e.g.:

```
<places>
  <place/>
  <place/>
  <place/>
</places>
```

vs.

```
<place/>
<place/>
<place/>
```

Informal descriptive elements are <structureOrGenealogy>, <generalContext>, <biogHist>. They are repeatable but can't be bundled in a plural element.

The current situation for the formal elements bears complexity, because there are multiple options to process these (repeated) elements. The proposed solution uses singular elements only in plural elements and makes only the singular elements repeatable. This makes processing easier as well as as there will always be a bundling element - if used at all - including one or more singular elements, e.g. <functions> (0..1) – <function> (1..n) – <term> (1..n) with [@lang](#) and other child elements of singular/plural elements.

Identity

There were user requests to rework on identity elements, c.f. GitHub issues [#44](#) and [#55](#). It was already decided to rename <entityId> to <identityId>, c.f. [<entityId> #115](#).

It was also already decided to change the encoding of the entity type by adding a new parent element <entityTypeDeclaration>. Child elements would be a mandatory, non-repeatable <entityType> to declare one of the three entity types, person, corporate body, or family. One or more optional child elements <localEntityType> would contain any text to specify the entity type, if needed. The optional attribute @localType should be added to both elements.

A lively discussion started around the element <entityType>.

- Kerstin pointed out that similar elements, like <eventType> and <agentType>, elements with a fixed list of terms as content, were turned to use these fixed values with a new, mandatory attribute @value instead. Furthermore, a “declaration”

wrapper element is only used within //control so far and might be avoided in the description area.

- Gerhard and Regine suggested to spare the additional element <localEntityType> and to make <entityType> repeatable, though that came with the difficulty that it might compromise interoperability and that having an option for local types was the initial user request. Alternatively, Gerhard suggested to make @entityType an attribute of <identity>.
- As EAC-CPF is following [ISAAR\(CPF\)](#) we are going to keep the limited list of entity types (CPF), as Karin indicated.

Decision: Kerstin creates a paper on [Topic: Entity types](#) to prepare a discussion and decision on this encoding. The discussion might be started in one of the virtual meetings until August 2020.

Names

A new encoding of names was agreed in and following the Austin meeting to simplify the encoding, c.f. paper on [Topic: Names](#).

- The element <nameEntryParallel> is renamed to <nameEntrySet>.
- The element <authorizedForm> is removed and replaced by the new attribute @status with values authorized and alternative.
- The element <preferredForm> is removed and replaced by the attribute @preferredForm with values true and false.

Do we need to refer from a name entry to a convention and to a source? If yes, the solution for [assertion description](#), see below, should be used.

Dates

In general we agreed to keep the current date encoding as there is no user request to change, but we will look at dates in terms of the EAD3 Reconciliation.

We decided to use the EDTF rules to encode open, uncertain and unknown dates, c.f. paper on [Topic: Dates](#).

Status of EAF

Joost reported about the status of an EAC-F/EAF schema to encode the description of functions, following [ISDF](#).

Topic: Assertion Description

Mark provided a new draft on [Including Evidence-Based Assertions in Encoded Archival Standards](#) and presented his proposal online. After some discussion during the virtual meetings and further comments in the online document, the final proposal was accepted by the attendees now.

Decision: The solution proposed in the current paper on [Topic: Assertion](#) was accepted:

1. Add a new optional element <citedRange> as a child of the existing element <source>.
2. Add new optional attributes @sourceLink and @maintenanceEventLink.

Remaining open questions:

1. Decision on elements where the new attributes @sourceLink and @maintenanceEventLink have to be added.
2. Decision if a similar link to the element <conventionDeclaration> is needed.
3. Replace <sourceEntry> with <citation> within <source>.

Task, also related to Topic: Relation and EAD3 Reconciliation, is to review the linking attributes in EAC-CPF and consider a “naming policy”.

Single issues

The topic of Single issues to decide was postponed. Most of the issues can be discussed and decided in virtual meetings or in the context of EAD3 Reconciliation.

Wrap-up and summary

Daily summary for TS-EAS members in a virtual session.

Decisions

Topic	Decision	Issue
Identity: Entity type	Discussion on encoding of entity type. Kerstin creates a paper on Topic: Entity types to prepare a discussion and decision on this encoding. The discussion might be started in one of the virtual meetings until August 2020.	#131
Assertion Description	Add a new optional element <citedRange> as a child of the existing element <source>. Add new optional attributes @sourceLink and @maintenanceEventLink	#43